Instructions for Using the 2010 CASA Report Formats

Introduction

The CASA program is finally nearing the end of the process of updating CASA reports to court. In December of 2009, CASA volunteers in Kent started using the preliminary versions of the new reports, which will soon be obsolete. Thanks in part to feedback from Kent volunteers, the program has continued to make improvements to the reports. We now have a new and improved set of report formats that has being posted on two websites so that CASAs can download them without having to have them sent from the office.

The new reports function differently than the old versions. They work more like online forms, and allow less room for formatting problems that require extra work by volunteers and staff to deal with. Like anything else new, it will take volunteers and staff a little while to get used to this new approach. For this reason, we are urging all CASAs to use the new reports, but allowing for a few months of experimentation before their use will be required.

We hope that you will find the new formats easy to use. We believe that once you are used to them, you will find them less time-consuming than the old formats. We also expect that they will be easier for us to review.

Please read these directions carefully before using the new reports. While they are straightforward for the most part, there are a few tricks to them, and reading the instruction before trying to use them will make the transition easier.

The new reports use Microsoft Word as their platform, just as the old reports did. The new reports however, use a combination of tables and "form fields" interspersed with open-text sections, while the old forms were entirely open-text. Fields allow information to be entered in a specific place in a document, and with specific, predetermined formatting. The text outside of the fields will be protected, and is unchangeable, which will prevent the problem of formatting being inadvertently changed by users.

The new reports use Microsoft Word 1997-2003 document *templates*. These templates will work with MS Word 1997-2003, MS Word 2007 and most other word-processing software that allows conversion to and from Word. This includes most, but not all versions of Apple/Mac software. Special arrangements may have to be made for users who have older or less common word-processing software.

Templates are computer files very similar to documents, except that they are designed so that each time you open one to start a new report, you are in effect making a copy of the file and working from the copy so the original file is left unchanged. This allows users to create reports from the same files multiple times without needing to get new files from the CASA office. Word templates have the extension "dot" at the end of their names rather than "doc" or "docx", which is the extension for Word documents.

Matching Hearings to the Appropriate Reports

There are fewer report formats now than there have been in the past. This is because some of the new formats can be used for more than one type of hearing. For example, the new format titled "Review Hearings Report" can be used for Permanency Planning Reviews, Initial Progress Reviews and Dependency Review hearings. The names of the new report formats and the hearings for which they are to be used appear in the table below. The new titles are more descriptive and can be more easily matched to the hearings for which they should be used.

Name of Hearing or Trial	Title of 2010 Report Format
-30 Day Shelter Care Hearing -Additional Shelter Care Hearing. *(Note: CASAs usually do not write reports for 30 day Shelter Care Hearings.)*	Shelter Care Hearing Report
-Dependency Pretrial Conference -Dependency Fact-Finding Trial	Dependency Fact-Finding Report
-Contested Dispositional Hearing -Motion Hearing	Contested Disposition and Motion Hearing Report
-Initial Progress Review Hearing -Permanency Planning Review Hearing -Dependency Review Hearing	Review Hearings Report
Permanency Planning Hearing-Post-termination Review Hearing-Post-termination	Review Hearings Report – Parents' Rights Terminated *(For cases in which parental rights have been terminated).*
-Termination Preliminary Hearing	Preliminary Hearing Report
-Termination Fact-Finding Trial	Termination Fact-Finding Report

Downloading report formats
The Program is posting the new report formats on the Superior court forms web page and the Friends of CASA web site. Volunteers can download the reports from either site, the addresses of which are:

http://www.kingcounty.gov/courts/scforms/casa.aspx

http://www.friendsofcasakc.org/info/forms.aspx

Macros, Certificates and Your Computer's Security

The new report forms contain automated devices known as "macros", which are designed to make the reports easier to use. As you download the forms from the CASA or Friends of CASA websites, save them to your computer, or open them in your word-processing program, your computer's security system may warn you about the existence of the macros, stating that they are potentially dangerous software and asking you whether you want to enable and run macros.

The report forms and the macros in them are completely safe to use. They have been digitally "signed" and certified to ensure your protection. These "signature certificates" are what allow your computer to "trust" the CASA program's reports.

This certification was purchased by the CASA program using Friends of CASA funds. **The CASA reports will not harm your computer in any way, so please answer "yes" when your computer's security system asks you if you want to download the files and enable the macros.** If your computer tells you that it has disabled macros, but does not give you an option of choosing to enable them, you may have to change a setting on your computer in order for the macros to work correctly. The location of this setting differs based on the word-processing program that you are using. You should feel free to change this setting if you know how. If not, seek the help of someone who does, use the help functions in your computer programs to learn how, or call the CASA office for help.

In some cases, you will be offered a check-box that says "always accept files from this source" or "always trust software from this publisher". If you receive this message, please check that box, and you will never see the warning messages again.

Saving the New Report Formats to Your Computer:

When you want to download the report formats from one of the web sites to your computer, please do so by using the "save" command rather than the "open" command. Once you have saved the files to your computer, you can keep them wherever you want to. If you received the report formats by email, you can also choose to save the original email message containing the formats and work directly from that message.

The following are general instructions for how to save Word templates to PCs via email programs. However, the variety of email programs and word-processing software makes it impossible for us to know how each person should save their report formats. If you have already been doing this successfully, continue to use the same approach. If you have questions, please contact the office.

When you open a new document that is based on a template, you should do so by double-clicking on the file or by right-clicking with your mouse, and choosing the "new" option. This will open a new document, and will leave the template intact. Your new document will be called "document 1" (or another number if you have other Word files already open). Please do not open the template file itself. **If you open the template file, you will see the full name of the file on the top of your page rather than "document 1".** If this happens, please close the file and re-open it as a "new" document. The problem with opening the file as a template is that once you have completed the report, the template will be "overwritten", and you will have to get a new one before you can write another report. Also, the macros, which are a critical piece of the report format, will not work if you open the template.

Do not open the file by going through your Word program and then double-clicking – this will open the template itself. If you are used to going through Word to open report files, you can do so, but you must right click on the file name and then select the word "new" rather than the word "open".

Now that you have a document opened, please save it with a new name before you start working on it. An easy way to name a file is to use the "CASA file number" followed by your initials. For example "10435bs" This is the naming convention used by the CASA program.

Filling Out the Body of the Report

When you first open a report document, you will immediately trigger a "pop-up" dialog box. This box is a key element to making the new reports work correctly, and is one of the features of the report that is based on the macros mentioned earlier. If the box described above *does not* pop up when you open your report, you have probably opened the template itself rather than a document based on the template, or the macros have not been enabled on your computer.

When the dialog box pops up, you will be asked to enter your name, the number of children you represent on the case, the CASA file number and the case location (Seattle or Kent). The CASA file number is the number that appears, along with your initials, in the upper right hand corner of all case-related documents you receive from the CASA program. It also appears on the edge of the file folder you received from the CASA program. Please enter the appropriate 4-7 digit number for your case (examples are "9987", "10147" or "10212-7") in the space provided.

In the lower left hand corner of the dialog box, you will see the following words in red lettering **"Remember: when filling out the text fields on CASA report forms, you can press the 'F2' key for hints and tips!".** This will be important to remember as you fill out your report. There are many hidden suggestions and tips about how to write CASA reports that can be brought up by pressing the **F2 key**. The key will not work everywhere in the document, but will work in most fields and in many of the text areas. Accessing these instructions will be especially useful for new CASAs, as they describe what should be included in each section of the report.

Please think of these suggestions as a source of guidance, not as points that have to be addressed in every report. If they are not relevant to your report, please do not feel that you have to write anything in response to them. As you gain experience as a CASA, you will not need to rely on these tips as much, but we urge all CASAs, no matter how experienced, to check out all of these **F2 key** instructions as you go through the new reports the first few times.

Once you have read the contents of the pop-up box and filled out the requested information, hit OK or the Enter key to return to the report. Note that the correct number of spaces will have been automatically inserted for the number of children specified by you in the initial dialog box.

As you fill out the report, use the Tab key to move from field to field, much as you would if you were using an online form. This is the easiest and most efficient way to move through the report. You can use your mouse as well, but the disadvantage is that placing the cursor on a field with the mouse does not always highlight the field in the same way that using the tab key will. Please note the "Tab" key does not help you move from a table field to an open-text area. You should use your mouse pointer to move through the open text areas.

When you come to a drop-down menu, which will be identified by a small arrow on the right side of the field, put your mouse pointer on the little arrow and left click. This will give you your drop down list. Left click on the option that applies to your case and hearing.

Note: You can return to any field in the report at any time by simply going back to the field with your mouse pointer and highlighting the field by double clicking with your left mouse button. However, you

will find the reports easier to use if you go straight through them from beginning to end using the Tab key.

Formatting Issues in Form Fields

The user will not be able to change formatting <u>within the form fields</u>. In other words, there is no mechanism for bolding, italicizing or underlining words when you are entering text into a form field. However, you will be able to use formatting and spell check in the areas of the report that are designed for entering open-text. The sections that require the most writing are all open text sections. If you have picture(s) of the children you would like to attach to your report, please insert them into an open text area of the report, or send them to the casa.group email address along with your draft report. The staff will attach the pictures to the reports for you.

Thank you very much for your patience with this new report process. There will be opportunities for future revisions to the formats in cases where it becomes clear that changes need to be made.